



Our process...

transferring your UK pension to New Zealand



You sign a Letter of Authority and our Client Engagement Terms



We obtain updated valuations from your UK pension scheme (this takes 4-6 weeks approx.)



We conduct our initial FREE assessment after you complete our Client Fact Find to establish your objectives and to ensure our comprehensive advice is suitable to meet your needs.



One of our partner tax agents will be on hand to assist in any tax related matters at this stage.



Should you wish to proceed, we recommend a suitable NZ QROPS and commence the transfer process.



We stay in regular contact with your UK Provider.



Your funds arrive in GBP cash so you can control the timing of the exchange to NZ\$.



The transfer fee is taken from your fund at this point.



You will now have completed a Risk Assessment Questionnaire for us to recommend a suitable investment strategy - which can be in GBP or NZ\$.



We produce a final report which includes illustrations of how your funds could grow once invested to your nominated retirement age.



Your funds are invested and we provide regular updates on how your investment is tracking.

0800 42 1966

www.financialmigration.co.nz
info@financialmigration.co.nz